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1 INSTRUCTIONS TO OFFERORS

1.1 Questions Regarding Request for Proposal (RFP)

Technical questions (EP 52.215.110) (April 1984) Offerors must submit all technical questions concerning this solicitation in writing to the contract specialist. EPA must receive the questions no later than fourteen (14) calendar days after the date of this solicitation. EPA will answer questions which affect offerors in an amendment to the solicitation. EPA will not reference the source of the question. Each question submitted must cite the particular document (i.e., RFP or Statement of Objectives (SOO)) and paragraph number/title for which the question pertains, unless the question is general in nature and not specific to a particular portion(s) of either the RFP or SOO.

CONTRACT SPECIALIST

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1.2 Submission Instructions (EP-S 99-2)

a. General Instructions

These instructions are in addition to the applicable requirements and clauses set forth in the Federal Acquisition Regulation regarding bid/proposal submission and late bids/proposals. Please note that there are distinct addresses designated for bid/proposal submission on the SF 33. Block 7 designates the location specified for delivery of hand carried/courier/overnight delivery service bids/proposals while Block 8 indicates the address specified for receipt of bids/proposals sent by U.S. Mail. Bidders/Offerors are responsible for ensuring that their bids/proposals (and any amendments, modifications, withdrawals, or revisions thereto) are submitted so as to reach the Government office designated on the SF 33 prior to the designated date and time established for receipt. Bidders and offerors are also responsible for allowing sufficient time for the bid/proposal to be processed through EPA's internal mail distribution system described below so as to reach the designated location for bid/proposal receipt on time. Failure to timely deliver a bid/proposal to the EPA Bid & Proposal Room on the 6th floor of the Ronald Reagan Building, which is the location designated for bid/proposal receipt in blocks 7 and 8 of the SF 33, will render the bid/proposal "late" in accordance with FAR 14.304 and/or 15.208 and disposition of the bid/proposal will be handled in accordance with FAR 14.304 and 52.214-7 for bids and FAR 15.208 and 52.215-1 for proposals. Bidders/Offerors are cautioned that receipt of a bid/proposal by the Agency's mail room or other central receiving facility does not constitute receipt by the office designated in the solicitation/invitation for bids.

b. U.S. Mail Delivery-SF 33 Block 8

Block 8 on the SF 33 indicates that bids/proposals sent by U.S. Mail must be timely received by the Bid & Proposal Room, Mail Code 3802R. Because EPA adheres to a centralized mail delivery system, any bid/proposal submitted via U.S. Mail to the address specified in block 8 of the SF 33 is initially routed to EPA's mail handling facility at another location in S.W.

Washington, DC, and then subsequently routed to EPA's Bid & Proposal Room (Mail Code 3802R) located on the 6th floor of the Ronald Reagan Building. The Bid and Proposal Room on the 6th floor of the Ronald Reagan Building is geographically distinct and is not co-located with the mail handling facility. Bids/proposals sent by U.S. Mail, therefore, will not be considered "received" until such time as they are physically delivered via EPA's mail distribution system to the EPA Bid & Proposal Room in the Ronald Reagan Building. Bidders/Offerors electing to utilize the U.S. Mail for bid/proposal delivery should therefore allow sufficient time prior to the designated time and date for bid/proposal receipt as specified in Block 9 of the SF 33 to allow for the internal routing of their bid/proposal to the EPA Bid & Proposal Room.

All bids/proposals submitted other than by U.S. Mail should utilize the Hand Carried/Courier/Overnight Delivery Service address specified in Block 7 of the SF 33.

c. Hand Carried/Courier Delivery- SF 33 Block 7

EPA's Bid & Proposal Room that is designated for receipt of hand delivered bids/proposals is located on the 6th floor of the Ronald Reagan Building (Room 61107), 1300 Pennsylvania Ave, N.W., Washington, D.C. The Bid and Proposal Room hours of operation are 8:00AM - 4:30PM weekdays, except Federal holidays. Because this is a secure area, EPA bidders/offerors/contractors and/or their couriers/delivery personnel must check in at the EPA visitor guard desk, located to the left of the 13 ½ street entrance, prior to gaining access to the Bid & Proposal Room. A properly addressed bid/proposal, as described below, will be required for admittance to the Bid & Proposal Room. Bids/proposals not properly addressed will be collected by the guard, and routed to the Bid & Proposal Room through EPA's internal mail distribution system, which will delay receipt of the bid/proposal in the Bid & Proposal Room.

d. Overnight Delivery Services- SF 33 Block 7

Bid/Proposal deliveries via overnight delivery services (e.g., Federal Express, Airborne Express) must utilize the address specified in block 7 of the SF 33. Due to the large volume of overnight packages delivered to EPA at one time, all overnight delivery services deliver only to EPA's loading dock at the Ronald Reagan Building, and not directly to the Bid & Proposal Room designated for receipt of bids/proposals in block 7 of the SF 33. From the dock, packages are routed to EPA's mail room in the Ronald Reagan Building for internal distribution, including distribution to the Bid & Proposal Room. It is important to recognize that regardless of whether the Bid & Proposal Room is noted on the address label as required by block 7 of the SF 33, overnight delivery service packages are NOT regularly delivered directly to the Bid & Proposal Room. Because bids and proposals must be physically received at the Bid & Proposal Room to be considered officially received, bidders/offerors should not rely upon guaranteed delivery times from overnight delivery services as guarantees that their bids/proposals will be officially received on time. Bidders/offerors remain responsible for the timely delivery of their bids/proposals to the Bid & Proposal Room.

e. Address Instructions

For US MAIL

Environmental Protection Agency
BID and PROPOSAL ROOM, Mail Code 3802R
Ariel Rios Building
1200 Pennsylvania Avenue, N.W.
Washington, D.C. 20460

Specified Date and Time for Receipt of Bids/Proposals:

Date Time

Solicitation Number:

Offeror's Name and Address:

For Other Than US MAIL

U.S. Environmental Protection Agency
Office of Acquisition Management
BID and PROPOSAL ROOM, Mail Code 3802R
Ronald Reagan Building, 6th Floor, Room 61107
1300 Pennsylvania, Avenue, N.W.
Washington, D.C. 20004

Specified Date and Time for Receipt of Bids/Proposals:

Date Time

Solicitation Number:

Offeror's Name and Address:

1.3 Format for Written Technical and Price Proposal

Quotations submitted in response to this RFP shall be formatted in accordance with the instructions provided in this section. There are five (5) volumes for this proposal.

Volume 1 – Down-Select Requirements Matrix

Volume 2 – Software Information

Volume 3 – Technical Approach

Volume 4 – Certifications

Volume 5 – Price Proposal

Printed Copies	<p>BINDER:</p> <ul style="list-style-type: none"> • 8.5 x 11 inch paper in three-ring binders, with the exception of fold-outs • Fold-out may use 11 x 17 inch paper and should only be used for diagrams, charts, figures and schedules. • RFP #, Copy # of Copies and Offeror's name on Binder's cover and spine <p>FORMAT:</p> <ul style="list-style-type: none"> • Double-sided • Single-spaced typed lines, including figures, glossaries • 1-inch margins • Standard page numbering • All pages within sections shall be consecutive <p>FONT:</p> <ul style="list-style-type: none"> • 11-point or larger (Arial) text for proposal and all attachments • 10-point or larger (Arial) text for all tables in the body of the proposal <p>Printed copies take precedence if there are discrepancies between the printed and the electronic copies</p>
Electronic Copies (CD)	<p>READABLE:</p> <ul style="list-style-type: none"> • Microsoft Word 2002 • Microsoft Excel 2002 • Microsoft PowerPoint 2002 (presentation slides) • Microsoft Visio 2002 (diagrams) • Microsoft Project 2002 (schedules) • Virus-free and can be opened and read by the EPA <p>CD MARKED WITH</p> <ul style="list-style-type: none"> • The Solicitation Number • The Offeror's Name • The Proposal Volume • Names and Types of Files contained within the CD <p>Electronic versions of the proposal shall be an exact match to the hard copy proposal.</p>

1.3.1 Number of Copies

The Offeror shall provide one (1) original and ten (10) copies for all volumes. The Offeror shall provide two (2) electronic copies on CD of all volumes.

EPA reserves the right to make copies of written proposals, which will only be distributed to staff who are participating personally and substantially in the Federal agency procurement, as defined in FAR 3.104.

1.3.2 Proposal Composition and Page Limitations

The Offeror shall prepare their proposal using the following guidelines:

- The Offeror shall not include any pricing information in Volumes 1, 2, 3 or 4 unless otherwise directed. Any pricing information in these volumes will be discarded.
- The Offeror shall provide a Contact Page, which includes the following information: (1) Company Name; (2) Name and Title of point of contact (POC) authorized to negotiate on behalf of the Offeror's organization; (3) Telephone number of POC; (3) Mailing address of POC; and (4) Names, Titles, and Telephone numbers of other POCs that EPA may contact if clarification of responses is needed.
- The Offeror shall provide a Table of Contents for each volume of the proposal. Offerors shall ensure that the Table of Contents references sections, indices, foldouts, figures, tables, charts and diagrams.
- In addition, the Offeror shall provide a Master Index. The Master Index must provide a single integrated index for the entire proposal. The Master Index must be placed at the beginning of each volume. This Master Index must identify each major subsection by number, title, volume, and page number. This index must also cross-reference the appropriate proposal volume and paragraphs to specific RFP paragraphs. The intent of the Master Index is to assure that all requirements are addressed and easily accessible to the evaluators. Copies of the Master Index must be identical for all volumes. The Master Index is not subject to page limitations.

The Offeror is limited in the number of proposal pages in selected sections.

WARNING: In the event the Offeror exceeds the specified page limit for the Down-Select Requirements Matrix or Technical Approach volume, the Government will remove the excess pages from the back of the volume, and they will not be evaluated.

Proposal Volume	Description	Page Limit
Volume 1	Down-Select Requirements Matrix	5
Volume 2	Software Solution	No Limit
Volume 3	Technical Approach	145, not to include past performance references
Volume 4	Certifications	No Limit
Volume 5	Price Proposal	No Limit

1.4 Proposal Content Requirements

The following instructions provide the Offeror with the description of content required in each volume of the Technical and Price Proposals.

1.4.1 VOLUME 1 – Down-Select Requirements Matrix

Volume 1 shall consist of the completed Down-Select Requirements Matrix. The Down-Select Requirements Matrix is located in Attachment XXX. Using the matrix, the Offeror shall provide either a yes (Y) or no (N) response to each question in the matrix. For each yes (Y) response, the Offeror shall include the rationale to explain how the proposed solution satisfies the requirement. All yes (Y) responses must have the rationale included to be considered technically acceptable and to warrant further consideration for award. In order to be considered for further proposal evaluation, the Offeror must satisfy each of the Down-Select Requirements.

1.4.2 VOLUME 2 – Software Solution

1.4.2.1 Requirements Response Matrices

Volume 2 shall include the completed Requirements Response Matrices. Please refer to the Requirements Response matrices which are located in Attachment 3 to the solicitation for detailed completion instructions. Functional matrices are grouped by functional requirement categories as defined in the CONOPs. Likewise, technical requirements are grouped by requirement category closely following JFMIP's framework. Offerors shall submit the completed matrices in the same format in which they were received. Columns and requirements shall not be added or deleted.

1.4.2.2 General Software Information

EPA anticipates that each offeror will provide a total solution, addressing all functional areas listed in the Concept of Operations (CONOPs), located in Attachment XXX. The solution may include Vendor-Owned, Third Party, or EPA legacy applications.

Offerors shall provide basic information about the applications proposed and the software company(s) that support those applications by completing the following tables. Modules owned by the core financial software vendor are considered Vendor-Owned.

Table 1 - Identify the name and version of the core financial management product proposed, the date of release and the expiration date of the JFMIP certification. In addition, include any modules outside of the core financial management product and all third party or EPA legacy applications proposed.

Functional Area	Product Name/Version Number	Release Date	Future Vendor Owned Module Release Date	Third Party Product or EPA Legacy System (when applies)	JFMIP Cert Expiration	Clients (for non-Vendor Owned Products only)
General Ledger						
Strategic Planning & Budget Formulation						
Budget Execution						
Payment Management						
Property Management						

Functional Area	Product Name/Version Number	Release Date	Future Vendor Owned Module Release Date	Third Party Product or EPA Legacy System (when applies)	JFMIP Cert Expiration	Clients (for non-Vendor Owned Products only)
Receipt Management						
Cost/Project Management						

Table 1

Table 2 - Provide the total number of completed Core Financial software installations in both the Federal and Commercial sectors for clients with 10,000-50,000 employees.

Indicate the number of clients that have upgraded to the current release.

Indicate how quickly your clients move to the current release.

Vendor Owned Module	Federal Client Completed	Commercial Client Completed	Clients that have upgraded to the current Release	How many federal clients have migrated to a new release within 18 months of release?	How many commercial clients have migrated to a new release within 18 months of release?
Certified Core Financial Application					

Table 2

1.4.2.3 Software Vendor(s) Information

Table 3 - Characterize any significant changes made during the past three (3) years or anticipated during the next three years to the technologies underlying the core financial product proposed. Also, describe the software vendor's corporate strategy or plan and anticipated investment amounts for future investment in Research and Development (R&D) for product(s) that support(s) the functionality within the scope of the SOO?

Explain your answer
Past Technology Changes
Anticipated Technology Changes
Corporate R&D Strategy:

Table 3

Table 4 - Describe the federal user groups that are established for the core financial management or third party products proposed.

User Group	Explanation

User Group	Explanation

Table 4

Table 5 - What is the frequency of new releases for the core financial management product proposed for the previous three (3) years from the issuance date of the solicitation and what do you plan for the future three (3) years from the issuance date of the solicitation?

Please provide frequency of new releases and explain your answer

--

Table 5

Table 6 – For each release in the past three (3) years listed in Table 5, identify all patches released including the date of release and brief description of each patch.

Release Name/Version	Release Date	Patch ID Number and Brief Description	Patch Release Date

Table 6

1.4.3 VOLUME 3 – Technical Approach

Volume 3 shall consist of the Technical Approach. This portion of the proposal is further broken out into the following sections/tabs:

Tab A Executive Summary
Tab B Technical and Functional Methodology
Tab C Organizational Experience and Past Performance
Tab D Management Approach
Tab E Quality Assurance Surveillance Plan

Tab A Executive Summary

The Executive Summary shall provide a concise narrative summary of the technical proposal, highlighting any key or unique features and value proposition for EPA. Offerors are encouraged to organize the Executive Summary information following the general outline for section 1.4.3, Volume Three "Technical Approach."

Tab B Technical and Functional Methodology

The Offeror shall submit the Contractor's Performance Work Statement describing the Offeror's approach and proposed methodologies for planning and performing the work included in the

SOO. The Offeror should refer to the CONOPs document to understand EPA's technical and functional environment.

The Offeror shall briefly describe, and graphically depict, the proposed solution that satisfies the functional and technical requirements of the FSMP, linking proposed software modules to required functionality. A physical architectural design composed of all hardware (e.g., servers) and software components (e.g., application S/W, DBMS) and their associated relationships (i.e., what S/W components are installed on what H/W components) shall be included in the proposal. The Offeror shall identify those legacy systems that will be replaced by the proposed solution, and shall include the rationale and the criteria used for selecting the proposed architectural components.

The Offeror shall include the following information as part of the Performance Work Statement:

- **Project Management Plan (PMP)** - The Offeror shall propose a project management plan for completing the requirement of this RFP. At its highest level, the PMP shall be organized by: 1) software acquisition and other non-labor development costs; 2) development activities through go live, and 3) hosting. Deliverables and tasks within these areas shall be at a level of detail needed by the offeror to adequately identify the work described in Tabs B and D of these instructions.

The PMP shall include a work breakdown structure (WBS) and a master schedule that depicts the tasks, activities, resources (including prime contractor, subcontractors, software vendors, EPA's staff resources, and EPA's Project Management Office (PMO) contractor support), level of effort (in hours by task), milestones and completion criteria. Offerors shall include the pricing methodology (e.g. fixed price, fixed-rate) and proposed risk-sharing methodologies for each task (at not less than one level below the three areas identified in the preceding paragraph). Submissions that do not explicitly address the Offeror's assumptions for use of EPA resources by task will be considered non-responsive.

The Offeror shall identify in the PMP the assumptions contained in the proposal and highlight those which have cost and schedule impacts. This shall include a description and level of effort of any contingency allowances established for known risks and expected unknown risks. These descriptions shall be organized in a consistent manner in the PMP at a level of detail at least one level below the three highest levels described above.

- **Product Familiarization Approach** - The Offeror shall propose a strategy for conducting the product familiarization task and producing results as expeditiously as possible. The product familiarization includes the time period to review and acclimate with the EPA systems and related documentation. The Offeror shall document its approach to gap analysis under the product familiarization task. This strategy may include recommendations for actions that EPA or the Contractor can take to accelerate the Contractor's transition into the FSMP program and to reduce the Contractor's learning curve.
- **Implementation Approach** - The Offeror shall propose an overall implementation strategy, which shall address the methodology, schedule, and risk. The Offeror shall identify the method of rolling out the solution throughout EPA.

The Offeror shall ensure that the implementation strategy leverages the Offeror's experience and understanding of EPA's needs. In proposing an implementation strategy, Offerors are not constrained by the approaches described in the CONOPs and EPA reference material posted on the websites for this requirement

(http://www.epa.gov/oamhpod1/adm_placement/fsmp/index.htm, and <http://www.epa.gov/ocfopage/modernization/index.htm>) , as long as the recommended strategy results in improved performance, efficient and effective business processes, lower cost or early accomplishment of milestones. However, deviations from the CONOPs and EPA reference materials must be identified and explained in the approach.

- **Approach to Integration/Interfaces** – The Offeror shall describe their approach to integration between the core and any feeder or legacy systems. Offerors shall provide a description of the interface to include the use of pre-built components, core system development tools, or third party tools. Offerors shall rank the level of effort for each task using the scale below. See Section 2.21 and Chapter 3 of the CONOPS, and SOO Appendix A for a diagram and list of required interfaces.

Low – Less than 150 hours

Medium - 150 to 500 hours

High - Greater than 500 hours

Offerors shall complete the following table:

Interface Description	Pre-Built Component	Core System Development Tools	Third Party Tools	Level of Effort

Table 7

- **Product Acceptance Test (PAT) Approach**– The Offeror shall propose the methodology, the timeline resources, and configuration and hardware necessary for this testing. For pricing purposes the Offeror should assume that the scope of the PAT will cover requirements identified by the Offeror as being fully met by their solution “out-of-the-box.” Particular attention shall be paid to those requirements defined as fully met in the Requirements Response Matrices, and are in addition to the JFMIP-certified requirements.
- **Data Migration/Conversion Strategy** – The Offeror shall provide its data migration/conversion strategy. For purposes of the proposal, the Offeror shall assume the conversion of current and four (4) prior years data, based on the volumetric information contained in Appendix D of the CONOPs.
- **Approach to Testing** –The Offeror shall address their overall testing approach, including the use of automated testing tools, and types of testing.
- **Change Management Approach** – The Offeror shall propose the methodology by which the changes resulting from the FSMP will be managed across EPA. At a minimum the approach shall address:

- **Business Process Reengineering** – The Offeror shall describe its approach to redesigning EPA's business processes in light of EPA's requirements and as a result of options available in the proposed software.
- **Workforce Impact** – The Offeror shall describe its approach to identifying the impact of business decisions made for FSMP on the performance of business processes and the staff who perform them.
- **Communication** – The Offeror shall describe its approach to supporting EPA's PMO in communicating with FSMP stakeholders and user communities.
- **Training** – The Offeror shall describe the proposed approach to develop and deliver training for FSMP, to include training for the EPA resources involved in development and implementation activities as well as end user training. The Offeror shall describe the training methods and schedule (e.g., the estimated training durations, content, tools, types of training, etc.).
- **Approach to Hosting** – The Offeror shall address its approach to Hosting. The Offeror shall provide descriptions of the reliability, scalability, availability, and maintainability of each proposed solution component and the expected network performance and bandwidth requirements. The Offeror shall address its performance measurement methodology. The Offeror shall provide computing performance metrics for platforms and system environments that the application is certified to run on. The Offeror shall provide Service Level Agreements to include:
 - System Availability
 - Backup and Recovery
 - Application Performance
 - Network Performance
 - System Performance
 - Help Desk Support

Offeror shall provide the approach to daily maintenance and operations help desk support, handling of bug fixes, and installation of new releases, as well as disaster recovery. The Offeror shall provide its schedule for periodic testing and evaluation of information security controls.

The Offeror shall address hosting as it relates to the following tiers:

- Tier 1: Basic Data Center, manage the computers and infrastructure
- Tier 2: Tier 1 plus manage the application, help desk, break - fix, run jobs, small patches.
- Tier 3: Tier 2 plus systems development and integration including major new releases

The Offeror shall provide its approach to release management methodology for updates and patches provided by the software vendor. The Offeror shall describe the involvement of customers in the upgrade decision process and shall describe upgrades to the core financial system in the solution accomplished over the past three (3) years and anticipated over the upcoming three (3) years. For each upgrade the Offeror shall describe the level of effort involved or anticipated and any assurances offered concerning the level of effort for anticipated upgrades.

Tab C Organizational Experience and Past Performance**Organizational Experience (maximum of five (5) pages)**

The Offeror shall provide a brief history of its organization to include all subcontractors that are being proposed. The Offeror shall describe the Offeror's experience during the past three (3) years in performing implementations of automated financial management systems of similar size, complexity, and scope within the public and private sectors. The Offeror shall highlight experience where it and/or its subcontractors collaborated on similar engagements

Past Performance

The Offeror shall submit the information specified in solicitation provision L.XX entitled "Past Performance Information". Work that will be considered similar would be of similar size, scope, magnitude and complexity to the effort described in this RFP. Be sure to include at least one client reference in each of the following categories:

- Comparable Public Sector Core Financial Management Systems: reference shall include a Federal sector, Treasury disbursing entity
- Comparable Infrastructure with Similar Size and Complexity: reference shall include a commercial or Federal entity with an infrastructure of similar size (users, transaction volume) and complexity (add language). Federal sector client preferred, but like size and complexity is more important than Federal experience in this category.
- Comparable Scope with Similar Requirements: reference shall be a Federal entity, Software, Implementation, Hosting.
- At least two (2) of the references (prime or sub) shall include hosting experience.

Tab D Management Approach

The Offeror shall provide the management approach for its solution. At a minimum, the management approach shall include the following elements:

- An overview of the Offeror's organizational structure — the overview shall describe (1) how the program fits into the Offeror's corporate or agency structure, and (2) the structure of the Offeror's proposed program organization and key personnel roles within that organization. In the event teaming or subcontracting arrangements are proposed for accomplishing the required work, the Offeror shall describe the organizational relationships of the Team Members and Subcontractors throughout the life of the contract.
- The proposed risk management approach for the pre-implementation, implementation and post-implementation activities. Identify major risks encountered on similar efforts and discuss how the approach addresses these risks.
- EPA Government-Contractor Partnership Strategy—The Offeror shall describe how it will work collaboratively with EPA employees and other EPA Contractors. The description of the proposed strategy shall include an explanation of the lines of communications and processes for identifying and resolving problems. Currently, the following contractors are supporting the FSMP: Booz Allen Hamilton, Inc.
- Staffing Plan— the staffing plan shall include the following information:

- an organizational chart(s) identifying the assigned personnel for each organizational element (where personnel have not been named, indicate the organizational team element and number of personnel);
 - a matrix that provides the major tasks (at a level of detail at least one level below the three highest levels described under "Project Management Plan" in Tab B) across the top of the matrix and the following as rows: each organizational element of the proposing team; within each element, the labor categories proposed, ordered by labor rate highest to lowest; a row for EPA staff; a row for EPA PMO contract support; a row or rows for any other resources anticipated for the successful completion of the project. For each cell formed by the intersection of columns and rows the offeror shall provide the estimated level of effort in hours.
 - the Offeror shall address the method of ensuring project continuity during staff transition throughout the life of the contract.
- The Offeror shall provide the resumes of the key personnel and representative resumes of the labor categories proposed. The Offeror shall assign sufficiently experienced personnel who are qualified in the conduct of similar operations (implementation strategy expertise, technical and functional expertise, training expertise, data conversion/migration expertise, business process re-engineering expertise, as well as financial management hosting expertise) and who have the required background and experience. Key Project Personnel include only those persons who will be assigned to this contract and who will be the actual personnel responsible for management and/or performance in the event the proposal results in award. The Offeror shall provide resumes for Key Project Personnel which the Offeror deems essential to contract performance. At a minimum, the Offeror shall submit resumes for their proposed Project Manager, Business Process Re-engineering Expert, Functional Team Lead, and the Technical Team Lead. The Project Manager shall at a minimum have in depth experience in the implementation and integration of the proposed software solution, both within the Federal Government and Private Industry. The Functional and Technical Team Leads shall at a minimum have in depth experience in implementing the software solution in organizations of similar scope and size to EPA, with desired experience in the implementation of a hosted solution. In addition, resumes shall include the employee's specific experiences that are directly related to the requirements of this RFP and which clearly demonstrate the relationship between each proposed individual's relevant professional certifications and qualifications, and the tasks (and task force team assignment) to be performed by that individual. Resumes shall be in chronological order with the latest dates of employment first and will identify the company or agency, period of employment, title and job description of the individual, and level of responsibility.
 - Each resume shall include the individual's signature certifying the accuracy of the information provided. In addition, the Offeror shall provide a letter executed by the appropriate senior corporate official listing the Offeror's proposed key personnel and certifying that the individual will be available to perform the specified role at award of the contract and for one (1) year thereafter.
 - Substitution of key personnel during task performance must be approved in advance by the Contracting Officer.
- Subcontracting Plan – The Offeror shall submit a subcontracting plan in accordance with FAR clause 52.219-9 entitled "Small Business Subcontracting Plan". The Offeror shall provide its Subcontracting Plan as Appendix A to Volume 3.

- Letters of commitment with Subcontractors.
- Approach to Earned Value Management
- Proposed physical location of the Offeror's workforce.

Tab E Quality Assurance Surveillance

EPA desires all task orders to be performance based. The Quality Assurance Surveillance Plan (QASP) will consist of cost and schedule standards established and measured through earned value management, service level agreements established and monitored as part of hosting services and quality of implementation objectives. The Offeror shall propose quality of implementation objectives and measures in the table below

Project Implementation Quality Assurance Objectives				
Objective	Required Service	Performance Standard	Acceptable Quality Level	Monitoring Method

As part of the overall QASP, the Offeror shall propose the performance period (monthly, quarterly) and the forum for which performance will be discussed.

1.4.4 VOLUME 4 – Certifications and Resumes

Volume 4 will be comprised of the documentation requested of the Offeror in support of the solicitation's Statement of Objectives.

- a copy of the Continuity of Operation Plan;
- documentation supporting successful Disaster Recovery Testing;
- self assessment against the Tier III criteria established by the Uptime Institute®;
- a copy of the SAS 70 evaluation;
- Completed Financial Management Line of Business, Center of Excellence, Due Diligence Checklist (Attachment XXX);
- Project Management Institute Project Management Professional (PMP) certification or equivalent; and
- CMMI Level 3 certification - EPA desires the Offeror to demonstrate the Offeror's implementation approach is based on mature, effective processes. Organizations able to demonstrate certification at a Capability Maturity Model Integration (CMMI) level 3 or higher will be deemed to meet expectation. A copy of the most recent certification shall be included. Other evidence may be provided, but will not have the weight of CMMI certification.
- Resumes (no page limitation)

1.4.5 VOLUME 5 – Price Proposal [RESERVED]

1.5 Oral Presentation and Solution Demonstration

An Oral Presentation and Solution Demonstration will be required for this solicitation. Only offerors that are considered eligible after the down-select process will be assigned a time for Oral Presentation and Solution Demonstration.

The purpose of the oral presentation and solution demonstration is for the Offeror to present the written proposal and to describe how the proposed solution would satisfy the objectives, capabilities, and requirements of the solicitation. Additionally, Offerors at this time will have the opportunity to present their proposed team.

The Offeror shall demonstrate the capabilities of the proposed solution by executing business scenarios provided by EPA. EPA may use the Offeror's completed Requirements Response Matrices to compare the Offeror's written responses to the actual demonstration results.

The Contracting Officer will contact each eligible Offeror to establish a date and time and verify the location for the oral presentation and solution demonstration. The order in which Offerors shall conduct their presentations will be determined by random drawing. Specific instructions and agendas for each day as well as business scenarios to be demonstrated will be provided to each Offeror twenty (20) business days prior to the scheduled date. When EPA provides the Business Scenarios, EPA will designate which items are to be addressed through product demonstration and which are to be addressed verbally through presentation.

The oral presentation and solution demonstration and all associated materials provided to EPA shall be in support of the proposed solution based on the SOO and the FSMP functional and technical requirements. If EPA decides the information being presented falls outside the scope of the areas allowed, the oral presentation and/or solution demonstration may be stopped.

1.5.1 Presentation Equipment, Location, and Team

The location of the presentation and demonstration is at a facility of the Offeror's choice, but within a local commuting distance of Washington, D.C. Offerors shall make available a private space for the EPA Technical Evaluation Panel to confer on a daily basis. Please provide a contact name, phone number and email address of the individual who is authorized to set up the oral presentation and solution demonstration time.

The Offeror shall be responsible for any equipment required for the presentation and solution demonstration to include all the preconfigured hardware and software. Offerors shall provide copies of their presentation deck. The number of EPA participants will be provided when the presentations are scheduled.

The Offeror's presentation team shall include, at a minimum, the proposed Project Manager, a corporate individual authorized to commit the firm and some or all of the designated key personnel necessary to best demonstrate the solution for EPA. The proposed Program Manager and team shall conduct the Offeror's presentation.

The Offeror's oral presentation may be recorded by EPA using a video camera and audio tape which may be disseminated to authorized personnel within EPA only.

It is anticipated that the Oral Presentation and Solution Demonstration will be conducted over four (4) business days, a maximum of ten (10) hours per day, including breaks. Offerors shall plan for a half day session for the Oral Presentation on the first day and solution demonstration for the remainder of the four (4) days. At the end of each day, The contracting officer will confer

with the technical evaluation panel (TEP) to determine if clarifications are required. At the beginning of the next day, the Offeror will meet with the TEP to provide clarification if necessary.

1.6 Clarifications

Clarification may be required to: enhance the Government's understanding of a presentation; allow reasonable interpretation of the presentation; facilitate the Government's evaluation process; or provide the Offeror an opportunity to clarify the relevance of its past performance. Any such interchange between the Offeror and the Government will be for the sole purpose of clarification only, and will not constitute discussions within the meaning of FAR 15.306. Clarification will not be used to cure proposal deficiencies or material omissions, materially alter the technical or cost elements of the proposal or otherwise revise the proposal. Offerors will not be permitted to make any revisions to the oral presentation or solution demonstration in writing or otherwise.

1.7 Disposal of Proposals

The Contracting Officer will retain at least one copy of each proposal, successful or unsuccessful and the remainder will be destroyed. No destruction certificate will be furnished. The Program Manager will retain at least one copy of the successful proposal.

1.8 Proposal Cost

EPA will not be obligated to pay any costs incurred by any Offeror in the preparation and submission of a proposal in response to this solicitation. The Contracting Officer is the only person who can legally obligate EPA for the expenditure of public funds in connection with this procurement.